

BUDGET ANALYST ROLE

Role Summary

The Budget Analyst Role consists of two grades (16 and 17). Incumbents are expected to provide assistance to the director in planning and monitoring all department expenditures, developing budget strategies, evaluating projections and projection methodology, preparing budget requests on behalf of the department, and coordinating the executive planning process. Work also involves responsibility for the Director's Office budget authority, authorizing payment of bills, and planning for necessary expenditures, and assisting in aligning department process goals and objectives with budget requests and authority. Primary contacts are with the director, department accountants and financial staff, state executive and legislative budget analysts, department management, and internal/external customers.

Working Conditions

Considerable mental stress and pressure due to workload, deadlines, time constraints, and significance of decisions made. Must be able to supervise numerous projects at one time and determine priorities on a daily basis.

Education and Experience

- Grade 16: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to a bachelor's degree in accounting and three years of accounting experience including two years of experience with computerized accounting systems. Other combinations of education and experience that could provide these requirements will be evaluated on an individual basis.
- Grade 17: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to a bachelor's degree in accounting and four years of experience in accounting or budgeting with a strong background in accounting principles and financial management, including experience with computerized accounting/budgeting systems. Other combinations of education and experience that could provide these requirements will be evaluated on an individual basis.

Department Core Competencies

In addition to the role specific competencies, there are four, department core competencies that all employees are expected to successfully achieve. These are:

- *Interpersonal Skills:* Builds constructive and effective relationships with internal and external customers and is committed to meeting customer needs in a timely and accurate manner. Listens actively and attentively and demonstrates an appreciation of other perspectives. Builds the appropriate rapport required to do business. Openly demonstrates an understanding of and respect for the value of co-workers' contributions to the department mission.
- *Decision-Making and Accountability:* Considers the department's vision, mission, and values in making decisions and taking actions. Identifies and considers possible alternatives before making decisions. Bases decisions on achieving desired outcomes pursuant to the

departmental business plan or management direction. Uses a combination of analysis, experience, and sound judgment that results in fairness and consistency, while being accountable for actions. When serious ethical issues are at stake, takes all necessary actions.

- *Commitment to Continuous Improvement:* Ability and willingness to continually seek greater efficiency in agency programs, is results driven, and meets changing requirements in work or direction. Adapts to changing conditions and work responsibilities. Accepts constructive criticism and suggestions and uses them to improve performance.
- *Personal and Work Ethics:* Creates own measures of excellence, and practices what he/she promotes. Sets goals that provide challenges and measures goal attainment regularly. Displays a contagious optimism about the work to be done. Goes beyond traditional ways to address issues despite obstacles or resistance. Is able to generate ideas, fresh perspectives, and original approaches and engages in open-minded thinking. Employs strategies to promote ideas and proposals to increase probability of acceptance. Mentors others to improve the performance necessary to achieve success. Reflects a belief that the results achieved are a direct result of his/her personal decisions and actions.

Grade Levels

Each grade level lists the essential duties that describe work performed 50 percent or more of the time (predominant work). Established work plans identify day-to-day tasks.

Grade 16

Predominant/Essential Duties

- Responsible for ensuring operational plans and budget authority allocated by managers is consistent with legislative appropriations.
- Maintain the financial components of the business case studies.
- Provide analysis of reimbursement formulas and rates for department functions.
- Manage ad-hoc budget teams.
- Research current trends, new developments, best practices, strategies, and management concepts.
- Participate in monthly budget projections and related research activities.
- Provide quality assurance audits to maintain process quality control plans.

Grade 17

Predominant/Essential Duties

- Develop budget strategies to optimize authorized appropriations.
- Monitor and evaluate budget projections, anticipate problems, and provide advice on budgetary opportunities to address anticipated/projected shortfalls on an ongoing basis.
- Assist in preparation and presentation of agency budget requests including biennial legislative budgets, budget amendments, supplemental, program transfers, and general fund loans.
- Provide quality assurance audits to maintain process quality control plans.
- Assist management in the development of long-term strategies and organizational implementation plans.
- Act as lead on monthly budget projections and related research activities.

- Research, develop, and implement budgetary strategies designed to effectively and efficiently accomplish the agency mission.
- Act as department liaison between the Office of Budget Program Planning and Legislative Fiscal Division.
- Recommend financial and programmatic impacts of budgetary issues facing the department.

Competencies and Degrees of Proficiency

The Competency/Proficiency Chart identifies the role specific competencies, degrees of proficiency, and guidance required for each grade level. Role specific competencies describe the knowledge, skills, and abilities required to perform the essential duties. The degrees of proficiency indicate the difficulty and/or complexity level of the tasks and assignments.

Competency/Proficiency Chart - Budget Analyst Role

Competencies	Grade 16 Minimal Guidance	Grade 17 Independently
Demonstrated knowledge of IRIS, Statewide Accounting Budgeting Human Resource System (SABHRS), Montana Budget Appropriations Reporting System (MBARS) and state laws, policies, and procedures.	B	C
Demonstrated research skill relative to the role.	B	C
Demonstrated analytical skills relative to the role.	B	C
Demonstrated knowledge and skill of word processing, spreadsheet, database, and software applications/programs relative to the role.	B	C
Demonstrated knowledge of theories and practices of accounting, including various accounting systems.	C	C
Demonstrated the ability to provide timely and effective written, oral, and interpersonal communication.	C	C
Demonstrated knowledge and ability in conflict resolution techniques relative to the role.	B	C
Proactively focus efforts and energy on successfully attaining goals and objectives, assuming accountability for decisions, actions, and results. Follow issues through to completion.	C	C
Demonstrated initiative, sound judgment, efficiency, independence, and reliability in the completion of tasks, projects, and other major responsibilities.	C	D
Demonstrated ability to work on multiple tasks and manage time effectively.	C	C
Demonstrated knowledge, skills, and abilities in budgeting theories and applications.	C	D
Demonstrated ability to think creatively and recommend innovative solutions.	B	C
Demonstrated ability to be accurate and detail orientated.	C	C
Demonstrated knowledge and effective application of federal/state statutes, administrative rules, and state policies and procedures relative to the role.	B	C

Degree of Proficiency

A: A degree of knowledge, skill, or ability commensurate with elementary-level tasks and assignments.

B: A degree of knowledge, skill, or ability commensurate with intermediate-level tasks and assignments.

C: A degree of knowledge, skill, or ability commensurate with advanced-level tasks and assignments.

D: An advanced degree of knowledge, skill, or ability commensurate with considerable experience and the application of the competency to non-standard tasks and assignments.

E: The most advanced degree of knowledge, skill, or ability, evidencing complete mastery and understanding of the subject.